Industry Day Prep Session

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Agenda/Overview

- **Purpose and Benefits of Industry Days**
- **Industry Days in the Pre-Award Process**
  - **When and Why?**
  - **Different focus for different phases of process**
- **Barriers to Open Communication**
- **Mitigating Communication Barriers**
- **Different Types of Industry Days -- Pros & Cons**
- **Basic Steps Toward Effective Industry Days**
- **Workshop: Your Industry Day**

Ktr = contractor
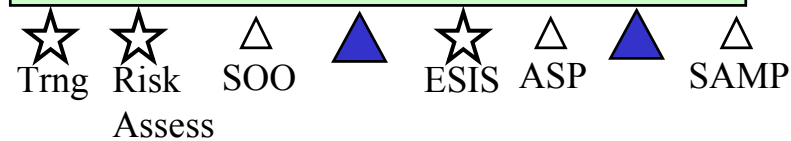
Purpose and Benefits of Industry Days

- **<u>Purpose</u>: Facilitate two-way communication between the Government and Industry during the acquisition development (pre-award) phase**

- **<u>Benefits</u>:**
  - **Opportunity to discuss key program issues**
  - **Provides data for informed decision-making (Gov't/Ktr)**
  - **Improves likelihood of successful contract execution**
  - **Better RFPs which clearly communicate Gov't needs**
  - **Focused, higher quality proposals**
  - **Fewer Evaluation Notices (problems & questions)**
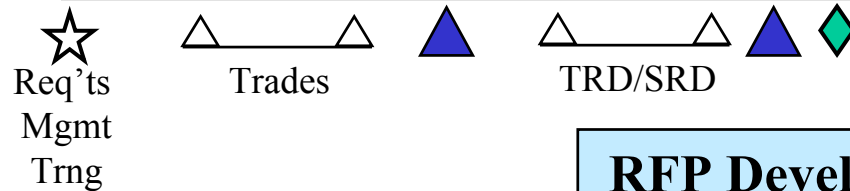 - **<u>More efficient source selections</u>**

Industry Days in the Pre-Award Process

Notional Timing

△ = IPT Product/Activity
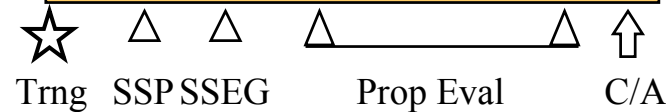
▲ = Industry Input (notional)

◆ = CCB of Spec by SPO

Acq Strategy Development

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Trng | Risk Assess | SOO | | ESIS | ASP | | SAMP

Technical Baseline (Spec) Dev

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Req'ts Mgmt Trng | Trades | TRD/SRD

RFP Development

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Trng | Sect A-M | DRFP | FRFP

Source Selection Activities

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Trng | SSP SSEG | Prop Eval | C/A

Contract Exec...

When and Why?

- **Before Acquisition Strategy Panel:**
  - **Early feedback on program objectives and program risks**
  - **Potential alternative strategies, schedules, approaches**
- **After Acquisition Strategy Panel:**
  - **Feedback on acquisition strategy, acquisition schedule**
- **During development of Technical Baseline (Spec):**
  - **Feedback on specific requirements and technical risks**
- **After first Draft RFP:**
  - **Feedback on proposal instructions and evaluation criteria**
  - **Answers to specific team concerns (questions)**
  - **<u>Separate</u> PRAG and/or Cost one-on-one sessions**
    - (See next chart)

Performance Risk Assessment Group (PRAG)

- **Treatment of Past Performance** (AFFARS 5315-305(a)(2))
  - One of four mandatory Factors (MC, PR, Cost, PP)
  - As important as the most important non-cost Factor
  - Two aspects: relevance of and performance on prior contracts
- **Challenges:**
  - Establishing meaningful relevancy criteria
  - Communicating proposal instructions that facilitate evaluation
  - "Balance" between information requested and page limitations
- **Lessons Learned:**
  - Select PRAG Chair as soon as RFP development starts
  - Start RFP as soon as Mission Capability Sub-Factors are "stable"
  - Seek unambiguous industry feedback on <u>every</u> change
  - Best Practice: Separate one-on-one sessions to discuss past performance instructions/criteria after first Draft RFP
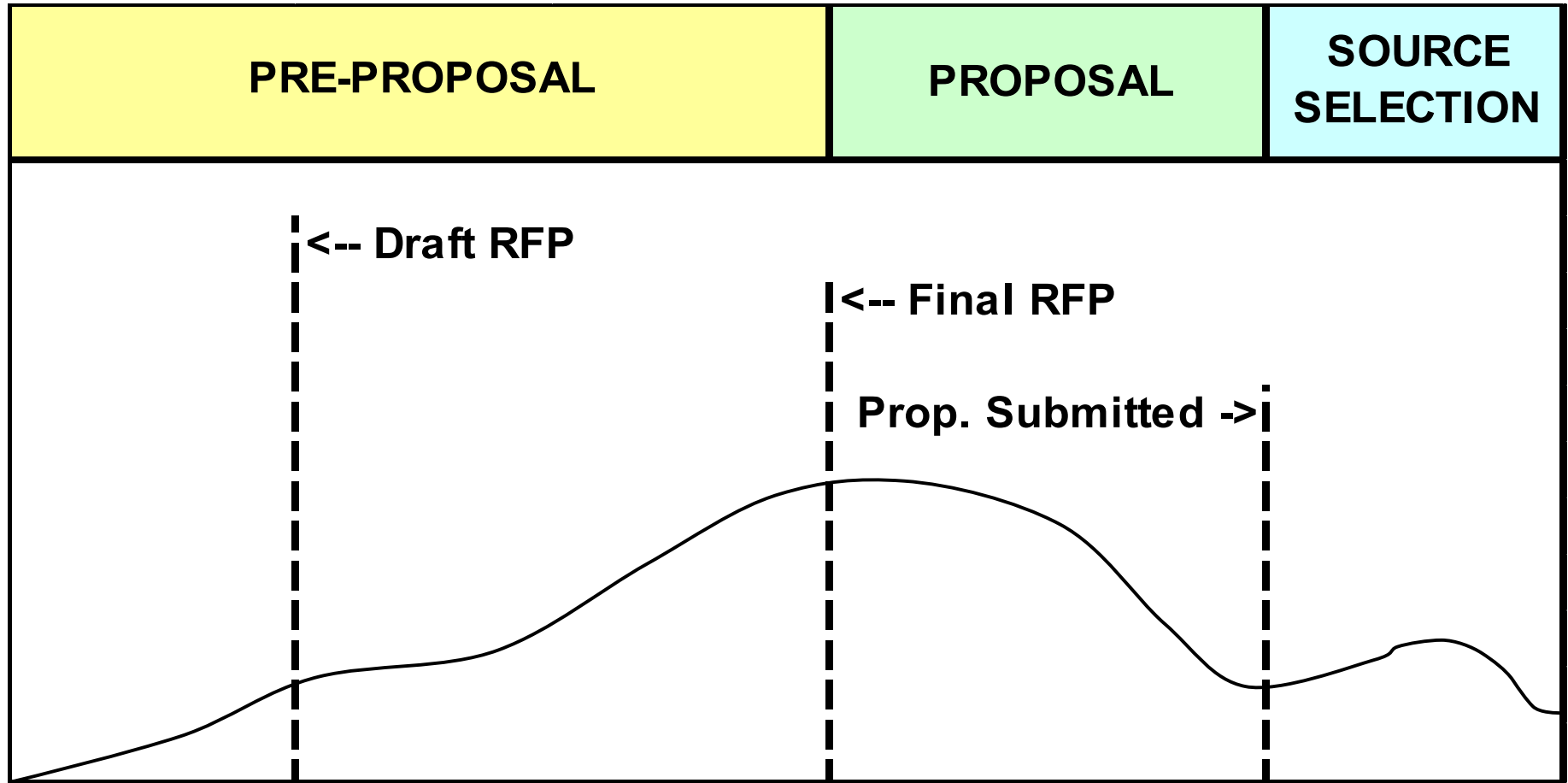
Industry Barriers to Open Communication

<u>Before asking questions, contractor's ask themselves</u>:

- **Will asking this question or making this comment:**
  - **Divulge a (perceived) competitive advantage?**
  - **Make our team look dumb, foolish, or ignorant?**
  - **Increase proposal costs? (i.e., expand proposal scope?)**
- **Can Gov't response cause us competitive disadvantage?**
- **Can a defensible assumption about the current RFP enhance our competitive advantage?** (thus negating need to ask question)
- **Can we afford to wait for Gov't to answer?**
- **Do we know what the answer is likely to be?**

- <u>**Additional barrier**</u>**: Proposal team may not include all necessary disciplines yet. Therefore, a question doesn't get asked because no one on Ktr team to ask it, yet.**

Typical Proposal Team Staffing History

PRE-PROPOSAL	PROPOSAL	SOURCE SELECTION

<-- Draft RFP

<-- Final RFP

Prop. Submitted ->

The proposal team hasn't formed yet

Mitigating Communication Barriers

- ✰ **Ask specific, detailed questions derived from Gov't team issues and concerns**
  - **Provide these questions well in advance of Industry Days**
- ✰ **Request answers to questions in one-on-one sessions**
  - **Request briefing charts be used to stimulate dialog on answers**
  - **Ask follow-up questions (during dialog) to ensure understanding by all**
- **Provide contractors with any Gov't data needed to permit informed, well thought out responses**
- **Provide contractors with sufficient time to respond**
- **Ensure the Gov't is prepared at the Industry Day**

Different Types of Industry Days

- **Open meeting - Don't expect open Ktr feedback!**
  - Pros - <u>gets same message to large audience</u>, easier to set up
  - Cons - restricts feedback of industry to Gov't, no assurance all understood message the same way
  - Best uses: explaining a new acquisition to industry, conducting a site visit, providing the <u>same status/update to several Ktrs</u>

- **One-on-One meetings - Ask specific questions to stimulate dialog**
  - Pros - facilitates two-way feedback, can be customized to the audience, efficient scheduling (time/travel) for Ktr
  - Cons - raises issue of equal treatment, difficult to control general information provided to each Ktr, time-consuming for PO
  - Best uses: <u>obtaining feedback from Ktrs</u>, conveying feedback peculiar to each Ktr

Different Types of Industry Days (Cont'd)

- **Combination: Open meeting followed by One-on-Ones**
  - **Pros - <u>best way to get feedback from contractors</u>, allows control of general information to Ktrs**
  - **Cons - most difficult to set up, most time consuming for SPO, requires careful planning to minimize travel inefficiencies for Ktr**
  - **Best use: Gov't communicates same message(s) to Ktrs in Open Meeting, then Ktrs communicate with Gov't in one-on-ones**

> *Gov't to Ktrs   =>   Open meeting*
> *Ktrs to Gov't   =>   One-on-Ones*
> *Two-way Discussion => One-on-Ones*

Basic Steps to Effective Industry Days

1. Determine expectations: 3-5 desired results
2. Determine documentation necessary to achieve expectations
   - Gov't to Ktr: Before meeting, at meeting, after mtg (minutes)
   - Ktr to Gov't: Slides at meeting, written comments after
3. Determine appropriate prep time for both Gov't and Ktr
   - <u>Allow Ktrs time to do their "homework"</u>
4. Decide on type of Industry Day:
   - Open meeting, one-on-one, combination
   - Most of the time: should be combination
5. Establish ground rules for the actual meeting(s)
   - For both Gov't and Ktr
   - Distribute to both Gov't and Ktr before meeting if possible

Basic Steps to Effective Industry Days

6. **Determine how the meeting will be documented (minutes, action items, deferred responses, etc.)**
   - *Best Practice: Ask Ktrs to use (and provide) slides to answer your questions and focus dialog/discussion*

7. **Determine who from the Gov't team will attend**
   - An initial list will prevent surprises (e.g., not enough chairs in the room for all the Gov't, Aerospace, SETA, user reps.)

8. **Decide on most appropriate method to invite Ktrs**
   - CBD, homepage, letter, telecon, etc.
   - PCO letter or email are most common types used

9. **Plan and execute the administrative side of the meeting (rooms, times, equipment needed, etc.)**
   - Develop a detailed plan and schedule as management tool

Workshop: Your Industry Day

Overall Approach

- **How many Industry Days?**

- **During which phases?**

- **When is the next/first one?**

Determine Expectations

- **What are the most important results we need from the next Industry Day?** For example ...
  - Feedback on objectives, risks, schedule or what?
  - Alternative contract type, test approach, funding profile, etc.?
  - Feedback on our most difficult technical requirements?
  - Proposed list of trade studies that will need to be conducted?
  - Alternative warranty/guarantee approaches?
  - Comments on our pricing strategy for production phase?
  - Contractor perspective on the need for a WBS dictionary?
  - Problems with contract data requirements?
  - Access to Gov't cost or performance models?

Determine Necessary Documentation

Consider expectations and determine:

- **What documentation does the Ktr need to prepare for the meeting?** For example,
  - Technical documents (TRD/Spec comments, top risks, ORD)?
  - Special clauses (Sect H), SOO, SOO elements, ASP minutes?
- **Does the Gov't need some information from the Ktr to prepare for the meeting?** For example,
  - Which Ktrs want to have one-on-ones and when?
  - Answers to previous questions? Results of analyses?
- **In what form does the Gov't want the Ktr response for the meeting?** For example,
  - Briefing charts (usually!), enough detail to understand answer
  - Full text comments, summary comments on briefing charts Soft copy of briefing charts provided at meeting?

Determine Necessary Preparation Time

Considering expectations and documentation (Gov't and Ktr) needed, determine:

- **How much time will the Ktr need to review documents, answer Gov't questions, prepare Ktr questions, etc?**

- **How much time will the Gov't need to gather the data and provide to Ktr?**

- **How much time will Gov't need to review Ktr data/questions/comments (and generate responses) prior to the meeting?**

Don't expect Ktrs to review a complex document and present detailed comments after only 2 or 3 days prep.

Determine Best Type Industry Day

Which type of Industry Day are we going to use for our next Industry Day?

- **Open Meeting?**

- **One-on-ones?**

- **Combination: Open Meeting followed by One-on-ones?**

- *(refer back to pros and cons charts if necessary)*

Summary

- **Determine your expectations for <u>each</u> Industry Day**

- **Define the documentation necessary**

- **Select the appropriate type of interchange**

- **Appoint an OPR for each Industry Day**

- **Develop a detailed plan and schedule ASAP**

- **Manage to the plan and schedule**